CHAPTER 3

PUBLICIZING

SYNOPSIS: A 17-ITEM FORMAT

U.S. Department of Commerce Commerce Business Daily Post Office Box 5999 Chicago, IL 60680

- 1. P!!
- 2. 0925!!
- 3. 85!!
- 4. 57936!!
- 5. 19111-5096!!
- 6. 95!!
- 7. Defense Industrial Supply Center, 700 Robins Ave., Philadelphia, PA 19111-5096!!
- 8. 95—metal plate steel!!
- 9. DLA500-86-B-0090!!
- 10. BOD, 111585!!
- 11. Contact, Mary Drake, 215/697-XXXX/Contracting Officer, Larry Bird, 215/697-XXXX!!
- 12. N/A!!
- 13. N/A!!
- 14. N/A!!
- 15. N/A!!
- 16. N/A!!
- 17. 95—Metal plate steel carbon,—NSN9515—00-237-5342,—Spec MIL-S-226988,—0.1875 in thk, 96 in w. 240 in lg.—Carbon steel.—45,000 lbs.—Del to NSY Philadelphia, PA, NSC Norfolk, VA.—Del by 1 Oct 86.—When calling, be prepared to state name, address and solicitation number.—See note 9.—All responsible sources may submit an offer which will be considered. *****

To the untrained eye, this 17-step outline may not make sense, but most contracting personnel will immediately recognize it (even though normally it is double-spaced between format items) as the format used to prepare synopses for the Commerce Business Daily (CBD). Synopsizing a proposed contract action in the CBD is one of several methods used to publicize the fact that you are seeking bidders to respond to your IFB.

LEARNING OBJECTIVES

At the completion of this course, you will be able to:

Overall: Select and implement the method of publicizing the proposed procurement and respond to inquiries concerning solicitations.

Individual:

1. Publicize an IFB/Award

- Determine the need for synopsizing an IFB/Award.
- Identify whether an exception to the synopsis requirement applies.
- Prepare a synopsis.
- Forward a synopsis.
- 2. Respond to verbal inquiries
 - State and describe information about the procurement that may not be divulged.
 - State what to do in responding to a verbal inquiry.

Exhibit 3-1. Learning Objectives.

CHAPTER INTRODUCTION FOR PART I OF CHAPTER 3

Why Publicize?

Contract actions are publicized in order to:

FAR 5.002

- Increase competition
- Broaden industry participation in meeting Government requirements; and
- Assist small business concerns, disadvantaged business concerns, and labor surplus area concerns in obtaining contracts and subcontracts.

What is a Synopsis?

A condensed statement of an agency's proposed contract action or an announcement of a contract award which is publicized in the Commerce Business Daily (CBD).

What is the CBD?

FAR 5.101

The CBD is the public notification media in which U.S. Government agencies identify proposed contract actions and contract awards. The CBD is published by the U.S. Department of Commerce in five or six daily editions per week, as necessary.

Other Methods of **Publicizing**

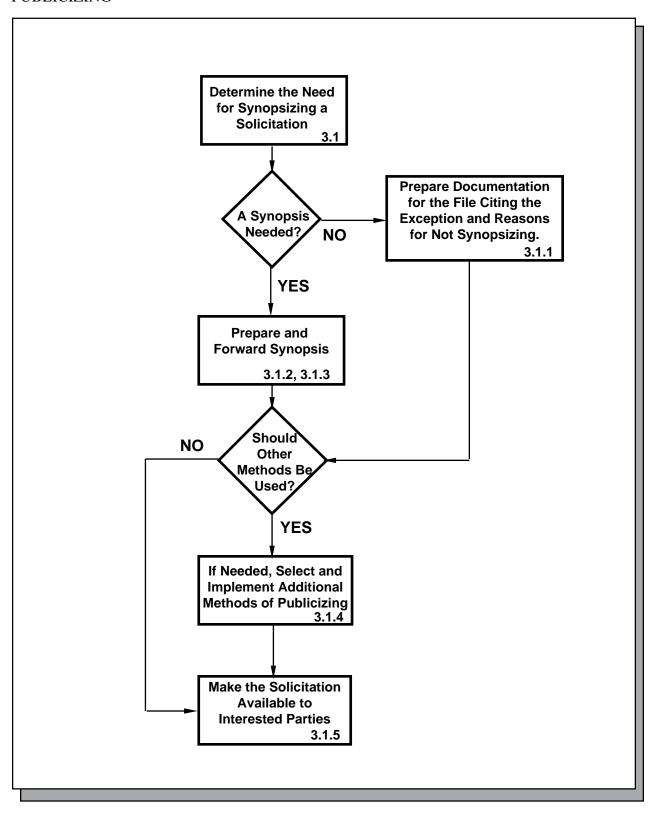
FAR 5.101(b)

In addition to synopsizing in the CBD, there are several other methods used for publicizing proposed contract actions, such as print and electronic media.

Steps in Publicizing IFBs

The steps in publicizing IFBs are charted on the next page. Following the flowchart, each step is discussed in turn.

The second part of this chapter (Responding to Preaward Inquiries) also will have a similar step-by-step process flowchart and introduction.



STEPS IN PUBLICIZING BIDS

3.1 DETERMINING THE NEED TO SYNOPSIZE

A synopsis is a condensed statement of an agency's proposed contract action. It is published in the Commerce Business Daily (CBD) and used to announce IFBs and contract awards.

Exhibit 3-3 lists the circumstances under which the synopsis of a proposed contract action is required.

CIRCUMSTANCES UNDER WHICH A SYNOPSIS IS REQUIRED

FAR 5.201 (b)

If the proposed contract action:

- Is expected to exceed \$25,000
- Is for a modification of an existing contract for additional supplies or services and the proposed modification exceeds \$25,000.
- Is an effort to locate private commercial sources for cost comparison purposes under OMB Circular A-76.
- Is any dollar amount and it would be advantageous to the Government to synopsize in the CBD.

Exhibit 3-3. Conditions for Synopsizing.

Note: Proposed contract actions expected to exceed \$10,000 and there is not a reasonable expectation that at least two bids will be received from responsive and responsible bidders <u>no longer</u> require synopsizing in the Commerce Business Daily.

3.1.1 Exceptions to Synopsizing

FAR 5.202

Even though the circumstances that require synopsizing may exist, there are several exceptions to the requirements for synopsizing. Most of the exceptions apply only to negotiated procurements; however, the following exceptions may apply to sealed bidding:

- When synopsizing might disclose classified information.
- When the requirement is for perishable subsistence supplies, and advance notice is not appropriate.
- When the requirement is for a brand-name commercial item for authorized resale.
- When the action is made under the terms of an existing contract that was previously synopsized in sufficient detail to comply with the correct procedure for synopsizing.
- When the action is by a defense agency and the contract action will be made and performed outside the U.S., its possessions, or Puerto Rico, and only local sources will be solicited.
- Unusual and compelling urgency

In addition to the above exceptions, the head of an agency can make the decision that advance notice is not appropriate or reasonable, after consulting with OFPP and SBA. The use of any of these exceptions must be documented in the contract file.

3.1.2 Prepare the Synopsis

FAR 5.207

General guidelines for preparing a synopsis are as follows:

- Use conventional typing with abbreviations, capitalization, and punctuation all grammatically correct.
- Each synopsis shall include all 17 format items. Do not include the title for the format item.
- Begin each line flush left and use double-spaced lines between each format item. If more than one synopsis is to be sent at one time, separate each synopsis with four line spaces and begin each synopsis with format item number 1.
- Minimize abbreviations or acronyms to only those most commonly recognized.

If you are telecommunicating the synopsis, the hard copy and electronic copy should follow an identical sequence and form, even though the typing style (i.e., font) will be different for the telecommunicated synopsis.

3.1.2.1 Format Items

General guidelines for the formatting all 17 items are:

- A new line of text is used for each format item.
- Precede each format item with the number of the item followed by a period (e.g., 1.).
- Following the period, there must be two spaces before beginning the entry.
- Next type the appropriate information for each format item.
- Conclude each format item with two exclamation points (e.g., !!).

Other guidelines include:

- When a format item is inapplicable (i.e., some items are pertinent only to solicitations and some are pertinent only to awards), leave two spaces after the item number period and type "N/A."
- Conclude each complete synopsis, following item 17, with 5 asterisks (e.g., *****).

Exhibit 3-4 shows a an example of the 17-item synopsis.

EXAMPLE OF THE 17-ITEM SYNOPSIS

- 1. Action Code
- 2. Date
- 3. Year
- 4. Federal Information Processing Standard (FIPS) Number
- 5. Contracting Office Zip Code
- 6. Classification Code
- 7. Contracting Office Address
- 8. Subject
- 9. Proposed Solicitation Number
- 10. Opening/Closing Response Date
- 11. Contact Point/Contracting Officer
- 12. Contract Award and Solicitation Number
- 13. Contract Award Dollar Amount
- 14. Contract Line Item Number
- 15. Contract Award Date
- 16. Contractor
- 17. Description

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- 12. N/A!!
- 13. N/A!!
- 14. N/A!!
- 15. N/A!!
- 16. N/A!!
- 17. 95—Metal plate steel carbon,
 —NSN9515—00-237-5342,—Spec
 MIL-S-226988,—0.1875 in thk,
 96 in w. 240 in lg.—Carbon
 steel.—45,000 lbs.—Del to NSY
 Philadelphia, PA, NSC Norfolk,
 VA.—Del by 1 Oct 86.—When
 calling, be prepared to state name,
 address and solicitation number.
 —See note 9.—All responsible
 sources may submit an offer

which will be considered. *****

There follows a brief explanation of each of the 17 items in the synopsis format.

1. ACTION CODE

Description: A single alphabetic letter denoting the specific

action related in the synopsis.

Application: Choices are limited to the following:

> P = Pre-solicitation Notice/

> > Procurement

A Award Announcement =

Modification of a previously M

announced procurement action

Sources Sought (includes A-76 R =

services and architect-engineer

contracts)

F Foreign Procurement Announce =

ment or Tender

2. DATE

Description:

Date the synopsis is transmitted to the CBD for publica-

tion.

Application:

Use a four-digit number indicating month in two

digits and date in two digits (MMDD).

All four spaces must be used with preceding 0 for months January through September (e.g., 0502

for May 2).

3. YEAR

Description:

Two numeric digits denoting the calendar year of the

synopsis.

Application:

Use the last two digits of the year (e.g., 87 for 1987).

4. FEDERAL **INFORMATION PROCESSING** STANDARD (FIPS) **NUMBER**

Description: Agency code number identifying the sending agency.

Application:

Normally a four or five character field.

Usually numeric, but may contain one or more

alphabetic characters.

Reference: FIPS publication 95, National Bureau of Standards. This publication identifies

federal agencies and related organizations.

5. CONTRACTING OFFICE ZIP CODE	Description:	Geographic zip code for the contracting office.			
OTTICE ZII CODE	Application:	 Up to nine characters may be entered. When using nine digit zip codes, separate the first five digits and last four digits with a dash (e.g., 00000-0000). 			
6. CLASSIFICA- TION CODE	Description:	Classification code number (see FAR 5.207(g) for codes).			
	Application:	 Each synopsis should classify the services or supplies under one grouping. If the action is for a multiplicity of goods and/or services, the preparer should group the action under the category best defining the overall acquisition based upon value. Synopsis will be rejected if no code or more than one code is provided 			
7. CONTRACTING OFFICE ADDRESS	Description:	The complete name and address of the contracting office.			
	Application:	Field length is open, but generally not expected to exceed 90 alpha-numeric characters.			
8. SUBJECT	Description:	A brief (up to 200 character spaces) title description of services, supplies, or projects required by the agency.			
	Application:	Insert classification code for Item 6 and the brief title.			
	Explanation:	This will appear in the CBD as the bold-faced title in the first line of Item 17, the description.			
9. PROPOSED	Description:	Agency number for control, tracking, and identification.			
SOLICITATION NUMBER	Explanation:	For solicitations only; if not a solicitation, enter N/A.			

10. OPENING/CLOS- ING RESPONSE DATE	Description:	Issuing agency's deadline for receipt of bids, proposals, or responses.			
	Application:	Use a six-digit date (e.g., MMDDYY).			
	Explanation:	• Explanation may appear in text of synopsis in Item 17.			
		 For solicitations only; if not a solicitation, enter N/A. 			
11. CONTACT POINT/CONTRACT- ING OFFICER	Description:	 Includes name and telephone number of contact. Also includes name and telephone number of CO if different. 			
	Application:	• This entry may be alpha-numeric and up to 320 character blocks.			
12. CONTRACT AWARD AND SOLICITATION NUMBER	Description:	The award, solicitation, or project reference number assigned by the agency to provide a reference for bidders/subcontractors.			
	Application:	This entry may be alpha-numeric and up to 72 character blocks, plus slashes and dashes.			
	Explanation:	For awards only; if not an award, enter N/A.			
13. CONTRACT AWARD DOLLAR AMOUNT	Description:	The actual award amount for the contract.			
	Application:	A ten-digit numeric field.Enter whole dollars only.			
	Explanation:	 For awards only; if not an award, enter N/A. Output will be preceded by a dollar sign (\$) 			

14. CONTRACT LINE ITEM NUMBER Description: A "line item number" is an identifying number for an

item of supply or service specified in the IFB for which

the bidder must bid or propose a price.

Application: Use alpha-numeric characters with dashes and slashes.

Character field not to exceed 32 spaces.

Explanation: • For awards—as desired only; if not an award,

enter N/A.

• If sufficient space is not available, enter N/A and

insert the contract line item number(s) in format

item 17.

15. CONTRACT AWARD DATE

Description: This item shows the date the award is made.

Application: Use a six-digit entry (e.g., MMDDYY).

Explanation: For awards only; if not an award, enter N/A.

16. CONTRACTOR

Description: Name and address of successful bidder.

Application: Ninety character spaces are allowed for full identifica-

tion.

Explanation: For awards only; if not an award, enter N/A.

17. DESCRIPTION

Description: This block of space is open-ended for entry of the

substantive description of the contract action.

Application: See 3.1.2.2

3.1.2.2 Application of Format Item 17

In preparing a synopsis for an IFB, the CO must ensure that Item 17—DESCRIPTION includes a clear description of the supplies or services to be acquired. In addition, the description must not restrict competition. It should allow a prospective bidder to judge whether a copy of the IFB should be requested. It should also include the following, to the extent applicable, in sequence, with each element separated by two hyphens:

FAR 5.207(c)

- Name of supply/service.
- National Stock Number (NSN), if assigned.
- Specification and whether a bidder, its product, or service must:
 - Meet a qualification requirement in order to be eligible for award, and
 - Identify the office from which additional information about the qualification requirement may be obtained.
- Manufacturer, including part number, drawing number, etc.
- Size, dimensions, or other form, fit, or functional description.
- Predominant material of manufacture.
- Quantity, including any options for additional quantities.
- Unit of issue.
- Destination information.
- Delivery schedule.
- Duration of contract period, including any option periods if CO anticipates that option will be exercised.
- Machine number and routing instructions for alternate means of accepting requests for solicitations (e. g., facsimile machine, Telex).

- Brief details with respect to: location, scope of services required, cost range and limitations, type of contract, estimated starting and completion dates, and any significant evaluation factors for architect/engineer projects and other projects for which the supply or service codes are insufficient.
- Numbered notes (see Section 3.1.2.3).
- When applicable, insert a statement justifying other than full and open competition, and identify the intended source(s).
- Insert a statement that all responsible sources may submit a bid, proposal, or quotation, which shall be considered by the agency.
- Provide the machine number and routing instructions when alternate means (facsimile, telex, etc.) are authorized.

If the proposed acquisition provides for a total small business or labor surplus area set-aside, state the following in the synopsis under Item 17:

"The proposed contract listed here is a 100-percent small business (or labor surplus area) set-aside."

If the proposed contract is a partial set-aside, state the following							
	If the	propose	d contract is	a partial	set-aside.	state the	following:

"An additional quantity of _____ is being reserved for _____ [insert small business or labor surplus area as appropriate] concerns under a partial determination."

3.1.2.3 Numbered Notes

In addition to the information required in Item 17, you may have to cite a Numbered Note (i.e., footnote) at the end of the synopsis. A Numbered Note is used to describe:

FAR 5.207(e)

- How to respond to the synopsis of a proposed contract.
- The qualifications a prospective contractor must have to be considered for an award.
- Instructions for small business or labor surplus area set asides
- Sole source award (Numbered Note 22)
- Trade Agreements Act of 1979 (Numbered Note 12)

The first issue of the CBD each week lists all current "Numbered Notes." When one or more of the Notes applies to a synopsis, the CO should reference the note at the end of Item 17 of the synopsis (e.g., "See Note(s) _____."). New Notes may be added to the list only when they apply to more than one agency.

3.1.2.4 Synopses for Awards

FAR 5.3

In preparing a synopsis for awards, fill in all format items. Fill in Items 9 and 10 using "N/A." Item 17 should include the following FAR considerations when relevant:

- The details concerning F.O.B. destination when total shipments from origin to destination will exceed 200,000 pounds and destinations are firm, such as origin when different from the address of the contractor; destination of shipment in continental U.S. and scheduled delivery period.
- A statement of the industries, crafts, processes, or component items for which subcontractors are desired in a geographic area indicated by the contractor. Include this information when requested by the prime contractor.

For more information on the criteria for writing a synopsis for awards, see Chapter 8 of this text.

3.1.3 Forward the Synopsis

In forwarding a synopsis to the CBD, you should:

- Transmit by electronic means whenever feasible.
- Transmit electronically using ASCII Code.
- Contact your agency's communication center for the appropriate transmission instructions or services.

When electronic transmission is not feasible, send synopses to the CBD via mail or other physical delivery of hard copy; address it to:

U.S. Department of Commerce Commerce Business Daily P.O. Box 5999 Chicago, IL 60680

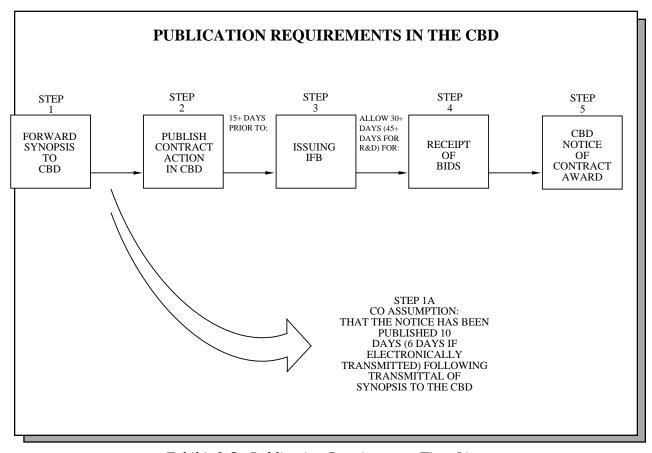


Exhibit 3-5. Publication Requirements Time Line.

- Step 1: The synopsis, if required for the solicitation, is sent to the CBD.
- Step 1A: COs may, unless there is evidence to the contrary, assume that notice has been published 10 days (6 days if electronically transmitted) following transmittal of the synopsis to the CBD. This assumption is based on the CBD's confirmation that publication does occur within these time frames.

If by chance a notice has not been published within these time frames, the CO should consider whether the date for receipt of bids can be extended or whether circumstances are sufficiently compelling to justify proceeding with the contract action.

FAR 5.203(a)

- Step 2: The synopsis must be published in the CBD at least 15 days prior to the issuance of the IFB.
- Step 3: Fifteen days after the synopsis has been published in the CBD, you can issue the IFB to any interested parties.

FAR 5.203(b)

Step 4: After the IFB is issued, agencies shall allow at least 30 days response time for receipt of bids.

Other situations:

FAR 5.203(c)

Agencies shall allow at least 30 days response time from the date
of the published notice of intent to contract for architect-engineer services or before issuance of an order under a basic
ordering agreement or similar arrangement.

FAR 5.203(d)

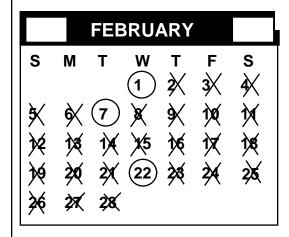
 Agencies shall allow at least 45 days response time for receipt of bids from the date of the published notice required in FAR 5.201 for contract actions categorized as research and development.

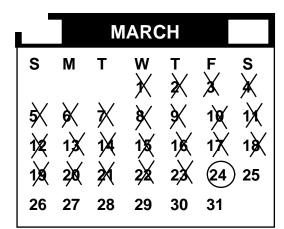
(Note, however, that contracts for A&E and R&D are not ordinarily entered into by sealed bidding.)

- Step 5: After bids have been opened, evaluated, and the contract awarded, you must synopsize such award in the CBD if:
 - The award exceeds \$25,000, and subcontracting opportunities are likely to result from the award.
 - Awards at lower dollar amounts may be publicized if it would be advantageous to industry or the Government to do so.
 - Award shall be made by mailing or otherwise furnishing a properly executed award document to the successful bidder.

Exhibit 3-6 illustrates how to use a calender to determine the amount of time to allow in publicizing the contract.

TIME REQUIRE 1289 SING A CALENDER





- Feb 1: Send synopsis to CBD by electronic means.
- Feb 7: CO can assume that the synopsis has been published in the CBD. (Start 15 day count.)
- Feb 22: Issue the IFB.
- Mar 24: Bid opening date and due date for receipt of bids.

Exhibit 3-6. Time Requirements Using a Calender.

The time requirements illustrated are minimum times. When planning your time for receipt and opening of bids, be sure that the opening date does not fall on a non-workday (i.e., weekend/ holiday). Also, when appropriate, attempt to allow more than 30 days response time for receipt of bids. That will give prospective contractors more time to prepare their bids, possibly resulting in more competition and lower prices.

3.1.4. Publicizing the Requirement By Other Methods

Other methods of publicizing IFBs may include:

- Preparing periodic handouts that list proposed contracts and displaying them in a public place at the contract office. This requirement is mandated for contract actions between \$10,000 and \$25,000.
- Assisting local trade associations in disseminating information to their members.
- Making brief announcements of proposed contracts to newspapers, trade journals, magazines, or other communications media for publication without cost to the Government.

FAR Subpart 5.5

- Using paid advertisements.
- If required by agency regulations, posting a copy of the IFB in a public place (but not before the issue date). A public place would include the contracting activity's bulletin board, bid room, or business service center.

When considering whether or not to use other methods of publicizing contract actions, recall the introduction to this chapter. Your objective is to "get the word out" that you have a requirement to fulfill for your agency, and to do that in a timely cost-effective manner. Therefore, assess these factors to help you determine what additional publicizing is necessary or appropriate:

- The extent to which you need to increase competition,
- The dollar value of the contract action, and
- The importance of the action.

3.1.4.1. Implementing Other Methods of Publicizing

The procedures to use with the other methods of publicizing that are listed under 3.1.4 are as follows:

- Preparing periodic handouts. This method relies upon the technical or requirements organizations having adequate acquisition plans. By reviewing those plans, you can, or they can, prepare a listing of anticipated needs for, perhaps, the next fiscal quarter or year. The handout is not an invitation and does not negate the need to synopsize in the CBD. This method is useful when you anticipate repetitive buys of the same or similar items because the prospective contractor may plan ahead to fulfill your needs— perhaps at lower prices.
- <u>Assisting local trade associations.</u> Often, one of the functions of a trade association is to assist members in getting new business. If you are not getting as much competition as you believe is desirable (e.g., building maintenance), check to see if there is an Association of Building Maintenance Contractors (the Association may have already contacted you). If so, they might give you names for your mailing list or offer to publish your IFB announcement in their trade journal free of charge.
- <u>Making brief announcements in newspapers, etc.</u> Some of the more aggressive publications contact procuring activities and volunteer to publish notices of IFBs free of charge. Or, you may make the contact and ask them to the publish notices, free of charge. Your agency's public affairs office might be of assistance.
- Paid advertisements. You will rarely need to use paid advertisements in order to boost competition unless you are selling rather than buying. For example, GSA places paid advertisements to announce the sale of surplus property. This is necessary because the sales are to the public in general and CBD notices and solicitation mailing lists will not reach prospective buyers. In the event, however, that you decide to use paid advertisements, you will need a contract or delivery order to pay for the advertising and accompanying art work, if any. The FAR contains definite instructions on the use of paid advertising at 5.5.

If required by agency regulations. This is similar to the use noted in the first bullet. While the coverage at FAR 5.101(a)(2) is designed for small purchases, you shall use those same procedures for large purchases if required by agency regulations to do so.

3.1.5 Make the **Solicitation Available** to Interested Parties (Issue the IFB)

After the IFB has been prepared and reviewed for accuracy and completeness, you should initiate the process for release of the IFB. A summary of the steps to be taken in that process are listed below.

- Prepare the synopsis (see Section 3.1.2).
- Forward the synopsis to the U.S. Department of Commerce (see Section 3.1.3) (NOTE: It is possible to expedite this process by releasing the synopsis prior to final preparation of the IFB).
- Hold the IFB and do not release it until 15 days after the synopsis (notice) has been published in the CBD.
- Fifteen days after the notice has been published in the CBD (and expiration of the 6/10 day period), release the IFB:
 - To those prospective bidders who have requested it as a result of having read the CBD notice,
 - To those firms who are on your solicitation mailing list,

including other public agencies, and

- To those firms who request it as a result of other publicizing actions or simply because they know about it and ask for a copy of the IFB.
- Maintain a reasonable number of copies of the IFB so that, upon request, potential sources not initially solicited can be mailed or provided copies of the IFB.
- Ensure that IFBs involving classified information are handled as prescribed by agency regulations.
- If the contracting office is located in the United States and the security classification permits, send IFBs and related correspondence to foreign addresses by international air mail.

FAR 14.205

3.1.5.1. The IFB — How Many Copies?

Determining the number of copies of an IFB that may be needed will take some thought on your part. The demand for copies might run from a very few (10-20 copies) to many (40-60 copies, or more). To help determine how many copies to prepare, you should consider several factors:

- Historical data as to the response on previous purchases of the same or similar items.
- The number of names to be used from the Solicitation Mailing List.
- The dollar value of the proposed contract.
- The time allowed for submission of bids.
- Any geographical limitation (such as labor surplus area) in IFB.
- The extent to which you have used, in addition to the CBD, other methods of publicizing.
- Limitations, such as a small business or labor surplus area setaside.
- The number needed for internal and file copies and those needed for making award.
- The number to be mailed out to each bidder, (i.e. for submission of original and 1 or 2 copies of bid).

You are required to maintain a reasonable number of copies so that you can promptly fill your planned needs as well as a reasonable number of additional requests. The rules pertaining to the availability of IFBs are at FAR 5.102 and provide that, in addition to your anticipated requirements you should:

- Provide copies on a "first-come-first-served" basis for pickup at your contracting office. Those copies are generally for the benefit of publishers, trade associations, information services, and other members of the public that have a legitimate interest in the procurement. If the procurement is for construction, you may make additional distribution as specified at FAR 36.211.
- Retain a copy of the IFB for review by and duplication for those requesting copies after the initial quantity is exhausted. You are allowed to charge a fee for these copies, not exceeding the actual cost of duplication.